

PROJECT MANAGEMENT

These NOREX Member-contributed documents include business case templates, project prioritization, project planning, project charters, and staffing, transcripts, and polls. | TK001

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**TO REQUEST A DOCUMENT FROM THIS TOOLKIT,
NOTE THE TITLE / NUMBER AND ADD THEM TO THE
COMMENTS AREA ON THE REQUEST FORM [HERE](#).**

Agile / Scrum

IT STRATEGIC PLAN This plan describes a four-year plan for GIS, financial services, service management office, web team, IT governance, and more. 39 Pages (20-1315)

AGILE-BASED QUALITY TESTING The following framework describes automated, inclusive testing, principal roles, and RACI testing. 23 Pages (20-1314)

TRANSFORMATION TO AGILE This presentation was given at a NOREX event and describes a migration to an Agile environment. 25 Pages (20-1086)

AGILE OVERVIEW Definition, introduction, values, principles, practices, and benefits of the Agile methodology are presented in this document. 30 Pages (20-1046)

AGILE A3 PROJECT CHARTER TEMPLATE This document provides an outline for preparing your project charter for an Agile methodology. 2 Pages (20-625)

AGILE / DEVOPS JOURNEY Given at a recent NOREX event, this presentation offers a look at a fellow Member's journey through the transition to an Agile / DevOps methodology. 16 Pages (20-555)

AGILE SPRINT CAPACITY PLANNER This worksheet provides categorization of Scrum team activities, planned and unplanned interruptions, prioritization, and support. 10 Pages (20-472)

SCRUM PRIORITIZATION MODEL This prioritization scoring model considers business impact, risk, cost, effort, and quality improvement. 2 Pages (20-375)

SDLC WITH FUNCTIONAL ROLES This Systems Development Life Cycle (SDLC) describes the functional roles of Agile and Waterfall deliverables. 2 Pages (20-200)

PROJECT MANAGEMENT ACTIVITIES CHECKLIST Agile and Waterfall deliverables are tracked along with each project phase of an activity or task. 2 Pages (20-199)

AGILE LAYER II PLANNING STRUCTURE This spreadsheet outlines requirements gathering and design for Agile and SCRUM teams. 5 Pages (20-024)

MS PROJECT DEVELOPMENT This project will develop a web application supported by IT that maintains the callout rotation and employee responses for a callout incident. 26 Pages (50-315)

DEVOPS AND COMPANY CULTURE This member presentation describes how Lean, DevOps, Agile, and architecture driven IT, along with company culture, are all critical components of successful solution delivery. 29 Pages (50-233)

CHALLENGES OF AN AGILE PRACTICE This presentation was given at a NOREX event and outlines how to tackle the challenges of an Agile practice. 16 Pages (50-232)

DEVOPS BENEFITS & CHALLENGES At a recent NOREX event, a Member shared experiences regarding the benefits and challenges of modern application development with DevOps. 6 Pages (50-296)

Business Case / Initiation

STAKEHOLDER REGISTER Stakeholder roles, responsibilities, and more are logged using this register. 1 Page (20-1016)

PROJECT PROPOSAL TEMPLATE This template provides an outline for drafting new project proposals. 5 Pages (20-955)

PROJECT MANAGEMENT TOOL COMPARISON This spreadsheet contains specifications about several PM tools, including Planview, MS Project, CA Project, Daptive, Smartsheet, Wrike, Asana, ClickUp, Monday.com, Bamboo, and SP Project Tracker. 24 Pages (20-932)

PROJECT AND SOLUTION DEVELOPMENT Outlined here is a process for managing IT projects from request or concept to deployment. 3 Pages (20-823)

BUSINESS PARTNER PROGRAM DECK An effective business partnership helps broker the coordination and communication between organizations. 15 Pages (20-810)

IT BUSINESS REQUIREMENTS Business requirements and processes are covered in this supply product project. 13 Pages (20-793)

IT PROJECT SELECTOR Consider strategic alignment, risk, and complexity when looking at proposed IT projects. This worksheet helps evaluate these variables. 3 Pages (20-724)

BUSINESS CASE WORKSHEET Project feasibility, initiation, planning, implementation, and shutdown are given weighted scoring in this business case worksheet. 3 Pages (20-723)

TECHNOLOGY PROJECT INITIATION Keep your technology project organized and properly outlined using the following initiation system. 2 Pages (20-670)

PM SERVICES SOW Following is a Statement of Work for Project Management services, which can be used as a template for other purposes. 4 Pages (20-427)

BUSINESS CASE PROCESS TEMPLATE This template helps to organize project plans for product justification, enabling your organization to prioritize its resources based on sound decisions. 10 Pages (20-425)

BUSINESS CASE TEMPLATE General project overview, staffing, costs/budget, benefits, and scheduling are all components of this template. 6 Pages (20-424)

IT BUSINESS CASE This template can be used to track your project assumptions, objectives, schedule, cost benefit analysis, and more. 5 Pages (20-423)

PROJECT PROPOSAL TEMPLATE When building your project plans, follow the steps outlined in this project proposal template. 5 Pages (20-410)

PROJECT BUSINESS CASE This form is to be completed when requesting a project. Include purpose, timeline, and costs. 2 Pages (20-367)

PROJECT MANAGEMENT SOW The following Statement of Work template contains requirements for quality control, methodologies, and open source software. 5 Pages (20-265)

BUSINESS ANALYSIS CENTER OF EXCELLENCE Following is a description of the components of a Business Analysis Center of Excellence, or BACOE, and its value. 19 Pages (20-257)

BUSINESS ANALYSIS IMPLEMENTATION PROJECT The Business Analysis Implementation Project (BAIP) was chartered to set up a formal structure for developing and supporting business analysis as a resource to assist business units with improving the efficiency, effectiveness, and success rates of their processes and projects. 16 Pages (20-256)

IT PROJECT INITIATION PROCESS This workflow was developed to provide the business unit with information to properly request, initiate, develop, and implement an IT solution that will meet their business needs. 6 Pages (20-177)

PROJECT INITIATION PLAN This plan includes initiation form, Rough Order of Magnitude (ROM), justification tools, business case, financial review, and project summary. 15 Pages (50-197)

THREE YEAR STRATEGIC ROADMAP This template outlines a three year plan for a project. 6 Pages (50-190)

Change Management

DIGITAL TRANSFORMATION SUCCESS Given at the 2024 NOREX International Roundtable, this presentation has been shared as-is with the author's permission. It describes the use of technology to radically improve performance or the reach of businesses. 24 Pages (20-1373)

CHANGE MANAGEMENT PROCESS These workflows show one organization's change management process. 5 Pages (20-1375)

GLOBAL IT CHANGE MANAGEMENT PROCESS This document describes a globally consistent IT change management process based on ITIL best practices. 18 Pages (50-407)

IT CHANGE MANAGEMENT POLICY This process provides a systematic way of managing changes to core systems in production environments. 8 Pages (20-1142)

CHANGE MANAGEMENT PROCESS EXAMPLE This guide outlines the resources and process steps required to manage changes to the production environment. 23 Pages (20-1127)

IT SYSTEMS CHANGE MANAGEMENT POLICY This policy governs IT system changes and streamlining processes while mitigating security vulnerabilities and potential loss. 3 Pages (20-1126)

CHANGE MANAGEMENT POLICY This policy describes how to document change management for security and protect information assets and systems from threats. 4 Pages (20-1125)

CHANGE REQUEST EXPECTATIONS This document describes expectations for making emergency, vendor, and normal change requests. 3 Pages (20-1115)

CHANGE ENABLEMENT PROGRAM This program is a framework to consistently document and evaluate technology and application modifications. 8 Pages (20-1114)

REQUEST FOR CHANGE Change management definitions accompany this change request form and flowchart. 3 Pages (20-1085)

CHANGE MANAGEMENT POLICY This policy describes the procedures employed to track and approve modifications to enterprise IT systems, technologies, supporting infrastructure, and solutions. 3 Pages (20-1064)

CHANGE MANAGEMENT PROCESS FLOW These guidelines help ensure standardized procedures are used for efficient and prompt handling of changes to minimize the impact of change-related incidents upon IT services. 8 Pages (20-1042)

CHANGE MANAGEMENT GUIDELINE These guidelines help ensure standardized procedures are used for efficient and prompt handling of changes to minimize the impact of change-related incidents upon IT services. 8 Pages (20-1041)

IT CHANGE REQUEST FORM This form includes description, impact categories, approval or rejection, and post-implementation sections. 2 Pages (20-1038)

CHANGE MANAGEMENT AND CONTROL POLICY This policy provides standardized methods and procedures to meet change management requirements supporting IT operations. 5 Pages (20-1027)

CHANGE MANAGEMENT CHARTER This charter is a systematic method for identifying, documenting, evaluating, and communicating all functionality and performance changes. 7 Pages (20-791)

CHANGE REQUEST PROCEDURE This process includes the information needed to classify the change type, the appropriate level of communication based on change, and how to document the change. 9 Pages (20-762)

CHANGE MANAGEMENT POLICY By having a formal change process in place, the impacts of proposed changes are better understood and the negative impacts of changes are minimized. 3 Pages (20-761)

IT CHANGE MANAGEMENT POLICY. This policy provides standard procedures for managing change requests in an agile & efficient manner. 2 Pages (20-704)

CHANGE MANAGEMENT POLICY This policy is designed to provide a process for requesting and managing changes to business applications and other business critical systems created or maintained by the IT department. 3 Pages (20-578)

CHANGE MANAGEMENT POLICY This Change Management process will assess the impact and risks of change, and document, identify, define, and formalize processes involved. 11 Pages (20-346)

CHANGE MANAGEMENT GUIDE A four-phased approach to Change Management is described in this manual of tips, resources, and samples. 27 Pages (20-331)

CHANGE MANAGEMENT PROCESS The Change Management process is designed to facilitate awareness of all parties involved in a technological change. 10 Pages (20-219)

IT CHANGE MANAGEMENT POLICY This policy shall cover all changes which have an impact to a business unit, business function, or IT service. 2 Pages (20-156)

CHANGE REQUEST TEMPLATE. This current and new system change request form has fillable fields and room to log descriptions and justifications. 3 Pages (20-135)

PROJECT CHANGE MANAGEMENT PROCESS This simplified form describes project application, definition, and change management workflow. 1 Page (50-437)

IT CHANGE MANAGEMENT PROCESS The change management process helps control the life cycle of strategic, tactical, and operational changes to IT services through standardized procedures. 12 Pages (50-427)

TECHNOLOGY CHANGE ADVISORY BOARD CHARTER This charter describes the role of the technical management committee responsible for reviewing and approving changes to the technology environment. 2 Pages (50-419)

IT CHANGE MANAGEMENT STANDARD This document present Change Management practices, under the umbrella of IT Service Management, to be adopted and practiced by IT employees and those employees whose changes fall under the oversight of IT Change Management. 14 Pages (50-247)

CHANGE MANAGEMENT QUICK REFERENCE This quick reference guide is intended to assist users with managing changes using ServiceNow. 2 Pages (50-243)

RISK ASSESSMENT The following risk assessment questions, submitted by three different member organizations, help assess the risk associated with technical changes. 3 Pages (50-221)

CHANGE ASSESSMENT QUESTIONNAIRE This change management document contains base questions regarding outages, followed by examples of answers. 4 Pages (50-318)

CHANGE MANAGEMENT RISK ASSESSMENT This simplified risk assessment is limited to a few questions and designed to be free from subjective responses. 1 Page (50-317)

Estimation / Scoring

CONTRACT MANAGEMENT SOFTWARE COMPARISON Four contract management software vendors are compared in this matrix – Conga, Agiloft, ContractWorks, and Optimus BT. 2 Pages (20-1357)

SOFTWARE DEVELOPMENT ESTIMATION MODEL Estimate cost and time involved with software development using this model. 1 Page (20-803)

IT PROJECT SELECTOR Consider strategic alignment, risk, and complexity when looking at proposed IT projects. This worksheet helps evaluate these variables. 3 Pages (20-724)

GOVERNANCE PROJECT SCORE SHEET A template for tracking and outlining the expected impact, performance results, compliance, and other aspects of a proposed project. 2 Pages (20-554)

PROJECT SCORECARD TEMPLATE Created for a medical environment, this scorecard template is suitable for device comparison and use as a decision matrix for many projects. 2 Pages (20-264)

SCORING TRIAGE MODEL This template is helpful for IT project budgeting based on value, legal requirements, probability, costs, and ability to deliver. 2 Pages (20-254)

PROJECT SCORING WORKSHEET This is an example of how the IT Advisory Council could score projects, used to calculate a weighted project score. 4 Pages (20-003)

Go-Live

FLEX WORK MODEL An organization shares their flex work model framework, outlining short, intermediate, and long-term outcomes. 1 Page (20-1251)

ERP IMPLEMENTATION CUTOVER PLAN These spreadsheets show Microsoft Dynamics 365 implementation plans including the go-live checklist and cutover procedure. 51 Pages (20-1197)

PRODUCTION READINESS CHECKLIST This checklist prepares the team for tracking project infrastructure, deployment, management, and impact. 2 Pages (50-348)

ERP GO-LIVE This example shows organization of Oracle support groups for ERP go-live. 1 Page (20-962)

RELEASE MANAGEMENT The release management process is described, as well as the benefits. 15 Pages (20-808)

PROJECT MANAGEMENT ONBOARDING This document lists project steps from charter to onboarding. 1 Page (20-807)

PROJECT GO-LIVE PLAN TEMPLATE The following template is a tool to assist in planning a go-live. 5 Pages (20-237)

GO-LIVE ACTIVITIES CHECKLIST System readiness, IT infrastructure, project risk, and governance are some of the activities to be checked before going live. 3 Pages (20-203)

CUTOVER PLAN This cutover plan for a Go-Live project includes getting started, readiness, and production. 2 Pages (20-179)

GO-LIVE ASSESSMENT The following chart reflects Go-Live readiness assessment. 2 Pages (20-178)

PMO (Project Management Office)

IT PROJECT AND PORTFOLIO MANAGEMENT GUIDE This is an introduction and overview of the Project Portfolio Management Guide as a standard for all IT projects. 8 Pages (20-988)

IT PROJECT PORTFOLIO MANAGEMENT STRATEGIC PLAN This presentation offers an outline of future plans for the PPM processes and scope. 10 Pages (20-802)

IT PMO CHARTER The Project Management Office charter is to improve both internal and external IT project execution and portfolio management. 1 Page (20-801)

GLOBAL IT PMO / PM ONBOARDING This plan describes SharePoint and Planview guidelines and procedures for Project Management Office onboarding, project lifecycle, and hosting meetings. 2 Pages (50-402)

PMO TECHNICAL REQUIREMENTS This presentation was given at a NOREX workshop and discusses the process of implementing changes to production. 15 Pages (50-280)

Project Change

PROJECT CHANGE REQUEST FORM Below is a project change request form template. 1 Page (20-790)

SERVICE PLAN TEMPLATE A Service Plan is designed to transition the sustainment responsibility from the project team to those involved in ongoing operations. 11 Pages (20-236)

PROJECT CHANGE FORM This form is used to describe changes and their impact to the project, as well as acceptance criteria. 2 Pages (50-440)

OPERATIONAL READINESS INTAKE This questionnaire provides an opportunity for each department to submit change requests in a timely and organized manner, so that they can be properly managed. 9 Pages (50-276)

Project Charter

MICROSOFT FABRIC PROJECT CHARTER Interested in replacing current data source architecture system, an organization investigates Microsoft Fabric with a Proof of Concept. 4 Pages (20-1322)

AI TEAM CHARTER This team charter describes how the AI Team will research, learn, and evaluate AI tools to determine their applicability and effectiveness. 1 Page (20-1285)

IT PROJECT SECURITY CHECKLIST The following checklist has been created to ensure security is being addressed throughout the lifecycle of any IT project. 2 Pages (20-1252)

LEARNING MANAGEMENT SOFTWARE PLAN This project charter is for identification and implementation of a cost-effective Learning Management Software solution. 5 Pages (20-1194)

PROJECT MANDATE TEMPLATE This document provides an outline for creating an organized project mandate including objectives, scope, and requirements. 6 Pages (20-965)

IT GOVERNANCE GROUP This presentation offers information on creating a governance framework promoting transparency, clarity, and consistency. 19 Pages (20-811)

ONE-PAGE CHARTER TEMPLATE This is a sample single-page project charter template that can be adjusted to suit your needs. 1 Page (20-800)

TECHNICAL REVIEW BOARD CHECKLIST A sample checklist for a project management technical review board. 1 Page (20-799)

PROJECT MANAGEMENT DOCUMENTS Topics such as quality, risk, cost, HR, staffing, communications, and other components should be documented for each project. 2 Pages (20-796)

PROJECT GUIDELINES All major IT projects that require configuration or development on company systems need to schedule and coordinate the following types of tasks and milestones. 1 Page (20-795)

RACI FOR PMF DELIVERABLES Project Management Platform (PMF) deliverables are listed according to the RAFI (Responsible, Accountable, Consult, Inform) scale. 4 Pages (20-794)

MEETING NOTES TEMPLATE Note-taking for a meeting can include detailing action items, discussion items, and future plans. 4 Pages (20-789)

PROJECT REQUIREMENTS TEMPLATE Project scope, objectives, roles, cost estimates, and other variables must be part of your project requirements document, a template of which is found here. 5 Pages (20-788)

PROJECT CHARTER TEMPLATE Provided here is a basic template for creating a project charter. 2 Pages (20-787)

PROJECT CHARTER LOG Use this template to record an overview of the program and highlight any dependencies, interactions, or prioritization among the program's projects. 1 Page (20-786)

EXAMPLE PROJECT REQUIREMENTS This example shows the planning stages of a project, where roles and responsibilities are determined. 6 Pages (20-785)

COMPLEXITY MATRIX & RISK PLAN TEMPLATE Track the complexity and risk of the proposed plan using these PMO templates. 2 Pages (20-784)

IT INTEGRATION PROJECT CHARTER The following is a table-style project charter template for IT integration. 2 Pages (20-713)

ONE PAGE PROJECT CHARTER The basic information for a project charter can be outlined in this one page template. 1 Page (20-712)

PROJECT CHARTER TEMPLATE This is an outline showing one variation of a project charter plan. 1 Page (20-711)

SOFTWARE ENHANCEMENT REQUEST FORM This workbook provides a procedure for business assessment and requesting software enhancement & workflow builds. 6 Pages (20-676)

TACTICAL MANAGEMENT ROADMAP Following is a process matrix and tactical roadmap of several IT processes and functions. 4 Pages (20-675)

TECHNOLOGY REVIEW PROCESS This review process has been created to evaluate the impacts of applying technology to company services. 7 Pages (20-672)

TECHNOLOGY REVIEW WORKFLOW These charts display an example of a technology review process workflow. 2 Pages (20-671)

PROJECT CHARTER TEMPLATE A key role resource plan, budget, and rough schedule highlight this charter template. 3 Pages (20-606)

EXECUTIVE STEERING COMMITTEE IT governance rules and IT Executive Steering Committee guiding principles are included in this charter. 10 Pages (20-543)

PROJECT DEFINE GATE TEMPLATE These provide a snapshot of the objectives, overview, budget, benefit, risks, and scope of a project. 2 Pages (20-253)

PROJECT MANAGEMENT CHARTER The IT Vendor Management Organization (IT VMO) works with the lines of business and IT to select and manage external product & service providers for the delivery of defined IT services. 8 Pages (20-116)

SYSTEMS GOVERNANCE CHARTER The Systems Governance Committee serves two roles – IT Governance and Project Portfolio Oversight. 4 Pages (20-083)

IT STEERING COMMITTEE The IT Steering Committee is a governing body for IT policies, procedures, and project portfolio in the organization. 2 Pages (20-082)

OFFICE PRODUCTIVITY REQUIREMENTS This spreadsheet provides a template for productivity evaluations, functionality & spam reporting, as well as calendar, directory, migration, meetings, and other topics. 8 Pages (50-283)

RAID TEMPLATE A Risks, Actions, Issues, and Definitions (RAID) log is a simple and effective project management tool for assessment and planning. 2 Pages (50-281)

PROJECT PLANNING EXAMPLE This worksheet provides a layout of the planning phase of a project. 1 Page (50-224)

PROJECT MANAGEMENT LITE Reasoning behind moving from PM to PM Lite, differences between the two, and supporting services, rollout and results are presented here. 15 Pages (50-200)

Project Planning

PM FRAMEWORK RACI DELIVERABLES The following project management framework deliverables are presented in a matrix by RACI phase. 2 Pages (20-1098)

RISK REGISTER TEMPLATE This worksheet is a log of constraints, risks, and issues within a project. 2 Pages (20-1015)

PROJECT MANAGEMENT PLAN This template provides a basic outline of all project lifecycle phases. 3 Pages (20-1013)

PROJECT SIZING NORMS This chart uses the T-shirt sizing method for determining the scope and duration of projects. 1 Page (20-856)

PROJECT ESTIMATION THROUGH T-SHIRT SIZING This model uses T-shirt sizing as an effective project scoping, forecasting, or estimation technique. 1 Page (20-855)

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TECHNOLOGY PROJECT INITIATION Keep your technology project organized and properly outlined using the following initiation system. 2 Pages (20-670)

PROJECT REQUEST TEMPLATE This example of a technology department's project request form is how the department can gather basic information. 1 Page (20-666)

SOW TEMPLATE A member shares a template from which you can create your own Statement of Work. 3 Pages (20-628)

GOVERNANCE INFORMATIONAL BRIEF This template provides a format for creating your own executive leadership team governance brief. 2 Pages (20-552)

SAMPLE PROCESS MAP The following is a sample process map for a Project Management Team's use. 1 Page (20-184)

IT PROJECT SCOPE TEMPLATE This is a basic template for organizing all of the aspects of an upcoming project. 2 Pages (20-155)

PROJECT PLAN TEMPLATE. A project plan is useful especially for projects that are expected to involve numerous people or resources, or expected to take larger amounts of time. 5 Pages (20-139)

PM PLAN TEMPLATES The following are examples of project management planning grids, group policy audits, and distribution projects. 4 Pages (20-138)

SOW TEMPLATE The following is a template & example of the main components of a basic Scope of Work. 4 Pages (20-102)

PROJECT DEFINITION FORM This form outlines the project itself as well as the scope, requirements, deliverables, RACI matrix, risks, and opportunities. 2 Pages (50-439)

PROJECT LIFECYCLE FORM Document your project all the way from request, scope, delivery, execution, and closure. 2 Pages (50-436)

PROJECT PLAN AND MATRIX This worksheet includes a project planning template and tables for tracking products at different locations. 5 Pages (50-395)

Project Prioritization

SUPPLY CHAIN METHODOLOGY PROPOSAL This presentation offers a proposal summary, prioritization model, and evaluation formula for supply chain methodology. 19 Pages (20-805)

IT PERFORMANCE DASHBOARD This project dashboard charts IT efficiency and KPIs. 1 Page (20-804)

PROJECT PRIORITY DETERMINATION This matrix helps to decide how to prioritize your IT projects. 1 Page (20-717)

IT WORK PRIORITIZATION PROCESSES Based on the type, size, and scope of work, this process can help identify which project and support teams must be involved. 1 Page (20-553)

PROJECT REQUIREMENT WORKSHEET Requirements for a project can be logged according to functionality and success factors. 2 Pages (20-498)

PROJECT PRIORITIES MATRIX Using this matrix will enable your organization to score and rate potential projects for a particular fiscal year. 1 Page (20-430)

PROJECT PRIORITIZATION Document the prioritization of IT projects according to urgency, cost savings, productivity, or other criteria with this table. 3 Pages (20-429)

PM MASTER SCHEDULE Project managers can use this to track project personnel, analyze capital projections & expenditures, and prioritize projects accordingly. For personnel resources, the spreadsheet lists each employee by project, tracks the hours needed by each person for each project, and adds up the total hours needed per person per project per week to help managers allocate and assign staff. 28 Pages (20-222)

GANTT CHART TEMPLATE This document has a tool that will auto populate a GANTT chart when you enter a task. It is a simple tool that is designed for Executive audiences or for a Project Briefing/Review. 3 Pages (20-136)

PROJECT REQUEST FORM The project request form lists the description, stakeholders, business drivers, expected benefits, dependencies, and timeline of the project. 1 Page (50-438)

PRIORITY-DRIVEN DELIVERY Slides regarding impact, urgency, and accountability help describe how priority drives an organization to focus and finish. 20 Pages (50-199)

CAPACITY MANAGEMENT: RULE OF 7 The Rule of 7 says that work items and project management activities are assigned a value by work type. If assignments total more than 7 points, action must be taken to reduce the workload capacity. 1 Page (50-198)

Project Summary

PROCORE IMPLEMENTATION OVERVIEW After implementing Procore construction management software, an organization shared their assessment of the program and lessons learned. 3 Pages (20-1325)

MONTHLY PROJECT MANAGEMENT REPORT This is an example of a Project Portfolio Management (PPM) summary outlining the status of company projects. 9 Pages (20-1179)

PROJECT LESSONS LEARNED For each project, record lessons learned during each phase of execution. 2 Pages (20-1017)

PROJECT CLOSEOUT FORM This template lists scope, funding, schedule, and other project closure specifics. 3 Pages (20-1014)

PROJECT REQUEST TEMPLATE This form outlines the business case for adding a capital project. 2 Pages (20-983)

PROJECT SUMMARY This template is for recording lessons learned, project results, and status report. 6 Pages (20-966)

WINDOWS 7 TO 10 PROJECT EVALUATION A Member shares an example of a Windows 7 to 10 upgrade project questionnaire. 1 Page (20-841)

PROJECT CLOSURE CHECKLIST When approaching the completion of a project, a closure checklist can help ensure all requirements have been met. 7 Pages (20-809)

LESSONS LEARNED LOG Keep a record of lessons learned during a project by following the format displayed in the template below. 1 Page (20-792)

ROI TEMPLATE This spreadsheet contains an example of an ROI method, logging call deflection, incremental cash flow, and risk aversion. 6 Pages (20-458)

RANKING LARGE IT PROJECTS This table creates ways of defining the success or failure of larger IT projects, including benefits & risk factors. 4 Pages (20-428)

RISK REGISTRY DASHBOARD This dashboard template logs impact area, source risk factors, description, probability, assessment, and response. 5 Pages (20-384)

RISK REGISTER TEMPLATE This risk register contains typical risks that have been identified on previous projects, potential triggers, and possible responses. A contingency plan is also suggested. 5 Pages (20-383)

POST-IMPLEMENTATION SUPPORT PLAN The following template assists in defining the support of the deliverable post-implementation. This document clearly sets the expectations for supporting the deliverable. 4 Pages (20-238)

PROJECT CLOSURE SURVEY This is a sample of a post-project survey and the types of questions that could be asked and answered. 1 Page (20-022)

PROJECT CLOSURE FORM A brief description of what your project delivered and the positive and negative outcomes. 1 Page (50-441)

POST IMPLEMENTATION REVIEW With a post implementation review, a project's execution can be assessed, achieved objectives can be identified, and lessons learned can be reviewed. 8 Pages (50-278)

Project Tracking

PORTFOLIO PLAN TEMPLATE This dashboard shows examples of planned and completed projects, color-coded status, and comparisons to previous years. 7 Pages (20-1178)

PROJECT BOOK TEMPLATE Chart status on project hours, risks, communication plan, issues, and lessons learned with this template. 13 Pages (20-580)

PROJECT DEFECT TRACKING Tracking project defects reveals what the issues are, the impact levels, root cause, and solution. 2 Pages (20-496)

TIME TRACKING SOP. This document provides guidelines for the tracking of IT Staff hours for both projects and non-project work. 2 Pages (20-255)

PROJECT MANAGEMENT WORKBOOK This workbook allows project managers, team members, and stakeholders to track & monitor project activities. 22 Pages (20-221)

PROJECT MANAGEMENT SCORECARD Following is a scorecard for mature resource management, including information on framework, ratings, samples, and scoring criteria. 11 Pages (50-194)

Staffing

CUSTOMER MASTER DATA PROJECT MANAGER 1 Page (20-798)

PROJECT MANAGER EXPECTATIONS. A Member shares three major characteristics of a good Project Manager. 2 Pages (20-797)

PROJECT ROLES & RESPONSIBILITIES This template helps describe the assignment of roles and responsibilities for your upcoming project. 2 Pages (20-783)

PROJECT MANAGEMENT COMPETENCY FRAMEWORK This chart provides a list of competency levels for those involved with project management. 2 Pages (20-688)

PRINCIPAL INFORMATION SYSTEMS ANALYST 3 Pages (20-612)

IT PROJECT COORDINATOR 2 Pages (20-583)

PROJECT COORDINATOR / SYSTEMS ANALYST 3 Pages (20-582)

PROJECT COORDINATOR / ANALYST 1 Page (20-581)

PROGRAM MANAGER 1 Page (20-520)

PORTFOLIO MANAGER 2 Pages (20-519)

RESOURCE MANAGER 1 Page (20-518)

PROJECT MANAGER 1 Page (20-517)

PROJECT ANALYST 1 Page (20-516)

PROJECT COORDINATOR 1 Page (20-515)

PROJECT ORGANIZATION CHART This chart shows typical organization for business systems or information systems projects between project core team, project team, and stakeholders. 1 Page (20-344)

RACI FOR PROJECT TEAMS Following is a responsibility assignment matrix for various project teams. 5 Pages (20-328)

PROJECT MANAGEMENT FLOWCHART This flowchart template is an example of the disbursement of responsibility within the IT department. 1 Page (20-327)

SENIOR IT PROGRAM / PROJECT MANAGER INTERVIEW The following questions are designed to help determine the qualifications of an individual applying for a Senior IT Program or Project Manager position. 6 Pages (50-275)

PROGRAM / PROJECT MANAGER 2 Pages (50-274)

Testing

OPERATIONAL TRANSITION READINESS This document captures design outputs of IT change, be it an application, infrastructure, or any other service, in preparation for providing an operational state that best supports business requirements. 19 Pages (20-806)

SOW: TESTING This template logs quality assurance COTS implementation, deliverables, and other aspects of testing. 1 Page (20-506)

REQUIREMENTS TRACEABILITY MATRIX Use this template to trace requirements to a test case, especially if testing is not housed in a testing tool. 2 Pages (20-505)

TESTING SIGNOFF TEMPLATE The following provides a format for recording results of project testing upon completion. 1 Page (20-501)

TEST STRATEGY & USE CASE TEMPLATES Project planning tools include this test strategy worksheet and a use case. 2 Pages (20-500)

TEST PLAN TEMPLATE This template is for any size project. Create for large, complex, high-risk, and / or high-visibility projects at the beginning of the project to ensure project team alignment & stakeholder approval. 6 Pages (20-499)

TEST TRACKING TEMPLATE This chart tracks pass/fail and defects when testing. 1 Page (20-497)

PRODUCTION ACCEPTANCE REVIEW The following checklist of test phase exit criteria questions is designed to help evaluate project management. 7 Pages (20-180)

QUALITY CONTROL TEST PLAN This is a test plan template for a Quality Control (QC) environment. 19 Pages (20-075)

SAP TEST DOCUMENTATION This workbook includes sample support pack schedule, descriptions, test signoff, and transaction list. 22 Pages (20-067)

SAP SUPPORT DOCUMENTATION This form includes support pack schedule, testing, and password reset. 1 Page (20-066)

Transcripts and Polls

CONSTRUCTION INDUSTRY TRANSCRIPT NOREX Members discussed emerging technologies; digital twins; IT / OT; securing Teams; project management; tracking resources; staff availability / time tracking; chargebacks; and budget trends. 16 Pages (NV2556)

ENTERPRISE ARCHITECTURE TRANSCRIPT NOREX Members discussed the role of EA; usage of TOGAF; multiple requests from the enterprise; involving business stakeholders; EA services; architects needed; EA investment; organizational development; staffing models; support tools; Cloud considerations; and project architecture. 19 Pages (NV2549)

MICROSOFT TEAMS ROOMS TRANSCRIPT NOREX Members discussed Teams Rooms usage and licensing; MTR pricing; transitioning from other platforms; Webex to Teams Rooms; Teams on Windows vs Android; domain vs no-domain join; remote hardware support; general MTR support; hardware recommendations; security considerations; room scheduling; Microsoft Places usage; and reading room hardware. 18 Pages (NV2548)

HEALTHCARE INDUSTRY IT TOPICS TRANSCRIPT NOREX Members discussed the usage of AI; security considerations; Electronic Health Systems (EHS); use of AI for transcription; utilizing generative AI; dealing with physicians; securing PHI and HIPAA data; and the Health Insurance Security and Accountability Act (HISAA).

CONSTRUCTION INDUSTRY: JOB SITE TECHNOLOGY TRANSCRIPT NOREX Members discussed handling remote internet access; methods to make subcontractors complete prequalification; managing remote cameras; tools and systems for job site equipment management; infrastructure changes to support robotics / automated machinery; drones and drone mapping programs; wearables; emerging tech for job sites; and types of AI / ML technologies being rolled out. 14 Pages (NV2535)

PROJECT & PORTFOLIO MANAGEMENT TRANSCRIPT NOREX Members discussed what constitutes a project: project prioritization; implementing stage gates; organizational visibility; communication tools; transitioning to a program management approach; PPM tools; reporting capability; managing “human capital”; time tracking; budgeting; and using project contractors. 21 Pages (NV2533)

GOVERNMENT IT ISSUES TRANSCRIPT NOREX Members discussed the role of portfolio management; engaging professional project managers to lead modernization efforts; tools for privileged access management; tools for account lifecycle management; trends to increase or decrease demand areas; technology for securely sharing confidential data; AI use cases; monitoring AI; preparing the organization for AI; and erecting guardrails around LLMs. 13 Pages (NV2532)

ENDPOINT DETECTION & RESPONSE TRANSCRIPT NOREX Members discussed lessons learned from the CrowdStrike outage; EDR tool requirements and performance; Windows Defender; additional security controls; utilizing multiple EDR tools; Arctic Wolf usage; SIEM usage; security control validation; remote device considerations; and Always On VPN. 19 Pages (NV2528)

FILE SHARING TRANSCRIPT NOREX Members discussed file sharing options; moving away from local file servers; Azure file shares; hybrid Azure; using multiple vendors; ShareFile usage; backup considerations; Teams guest access; external sharing; VPN alternatives; Google usage; integrating with workflows; and migrating on-prem to Cloud-based SharePoint. 17 Pages (NV2523)

KNOWLEDGE MANAGEMENT TRANSCRIPT NOREX Members discussed effective KM procedures; establishing governance; lifecycle management; creating a KM program; managing a number of knowledge bases; SharePoint Usage; tools; incentivizing employee usage; identifying SMEs; usage of Scribe; and data retention. 15 Pages (NV2521)

IMPACT OF GENERATIVE AI ON THE WORKFORCE TRANSCRIPT NOREX Members discussed introducing GenAI to the organization; where and how GenAI is being piloted and used; Copilot; linking AI products to strategic business goals; build or buy AI solutions; technology setup; Microsoft Purview; projecting proprietary data; AI reshaping / enhancing job roles; AI in data science; and AI in higher education. 18 Pages (NV2516)

ENTERPRISE ARCHITECTURE TRANSCRIPT NOREX Members discussed where EA fits organizationally; the role of governance in EA; purchasing / procurement departments; EA related to GenAI; SaaS solutions / contracts; technology reviews; management tools; and EA success metrics. 16 Pages (NV2510)

SERVICE MAPPING FUNDAMENTALS TRANSCRIPT NOREX Members discussed service mapping vs configuration management; implementation experiences; mapping tools; mapping across shared technologies; ServiceNow partners; tag-based mapping; microservices; issues with low-code platforms; working with ServiceNow; differentiating between CIs, services, and dependencies; and integrating with ITSM processes. 13 Pages (NV2506)

BANKING / FINANCIAL INDUSTRY IT ISSUES TRANSCRIPT NOREX Members discussed compliance issues; regulatory trends; onboarding / offboarding software; AI usage; AI / ML for enhanced customer service; Cloud usage; IT staffing trends; remote work trends; and the impact of AI on IT careers. 15 Pages (NV2503)

GOVERNMENT IT ISSUES TRANSCRIPT NOREX Members discussed prioritization and budgeting; centralized, decentralized, or hybrid IT departments; out of state FTE positions; publishing the application catalog innovation and new capabilities; M365 governance and communication; managing AI; impact of emerging technologies; Cloud strategy; and disaster recovery and continuity of operations (COOP). 14 Pages

PROJECT MANAGEMENT TRANSCRIPT NOREX Members discussed software tools; Azure DevOps; tools for IT vs the enterprise; MS Project; project queue visualization; scoring models; use of AI; MS Copilot; automating with Power BI; workflow approval; Teams for projects; success measurements; decommissioning projects; and lessons learned. 20 Pages (NV2499)

MANAGING TECHNICAL DEBT TRANSCRIPT NOREX Members discussed the definition of technical debt; problems that occur; cleaning up a ServiceNow database; upper-level support; cyber attack risks; strategies to remediate technical debt; budget considerations; security risks; project delivery considerations; and Cloud vs on-prem technical debt. 18 Pages (NV2496)

CHANGE ENABLEMENT TRANSCRIPT NOREX Members discussed the definition of change enablement; introducing to the organization; who drives the initiative or is it an organization-wide initiative; CAB considerations; project selection; leadership support; tips for improving processes; separating change and release; ERP transitions; retaining staff buy-in; project transparency; training resources; and change enablement metrics. 16 Pages (NV2494)

RANSOMWARE TRANSCRIPT NOREX Members discussed lessons learned; paying or not paying the ransom; ethical and legal considerations regarding payment; engaging outside assistance; ransomware plan vs cybersecurity plan, immutable backup; early detection; reporting an attack; security and vulnerability assessments; and cybersecurity insurance considerations. 16 Pages (NV2488)

TRANSPORTATION INDUSTRY IT ISSUES TRANSCRIPT NOREX Members discussed cybersecurity practices and tools; automating cybersecurity processes; user training videos; Azure Sentinel; securing personal messenger apps; WhatsApp security considerations; vendor flow; deploying MFA for all types of access; applying security certificates; black box device security; predictive ETA tools; and capturing real-time vehicle data. 14 Pages (NV2486)

SD-WAN TRANSCRIPT NOREX Members discussed SD-WAN pros and cons; deployment; the complexity of SD-WAN; public vs private internet connections; backup strategies; cost considerations; quality-of-service experiences; firewall positioning; P2P traffic performance; VPN connections; vendor selection; Fortinet usage; Cisco vs Meraki; utilizing multiple vendor solutions; Palo Alto; managed services options; SASE; WAN acceleration; and Always On VPN. 19 Pages (NV2483)

MANUFACTURING INDUSTRY IT ISSUES TRANSCRIPT NOREX Members discussed aligning IT with manufacturing processes; the “walkabout” model; implementing an enterprise-wide approach; network segmentation strategies; patching floor systems; Manufacturing Execution Systems (MES); ERP integration with manufacturing processes; authentication for frontline workers; Microsoft Dynamics; and dedicated operational technology. 18 Pages (NV2482)

SERVICENOW TRANSCRIPT NOREX Members discussed the optimal size of an organization to utilize ServiceNow; showing leadership the value to justify ServiceNow; customization; modules and features; ServiceNow shortcomings; JavaScript; onboarding and migration; and open tickets directly with ServiceNow. 16 Pages (NV2476)

MERGERS & ACQUISITIONS TRANSCRIPT NOREX Members discussed merger and acquisition experiences and recommendations; acquiring executive consideration for technical issues; M&A planning; managing due diligence; identity federation; migrating Active Directory and Microsoft Forms; platform and cross-platform migration tools; ERP migration; domain access; management software / discovery tools to inventory IT asset inventories; and enterprise reporting platforms. 16 Pages (NV2473)

CONFERENCE ROOM TECHNOLOGY SOLUTIONS TRANSCRIPT NOREX Members discussed conference room monitoring and management strategies; staff dedicated to conference room management and troubleshooting; training capable users; tool experiences and recommendations; cost of conference room technology solutions; projectors vs TVs; moving away from complex-type rooms to Microsoft Teams rooms; Microsoft licensing; camera options; using Teams with non-Teams meetings; hybrid solutions; accommodating

classroom meetings; microphone considerations; and large occupancy rooms. 25 Pages (NV2464)

IT STAFF DEVELOPMENT / TRAINING TRANSCRIPT NOREX Members discussed the percentage of IT budget planned for training and development; hours / certifications required per year; measuring success of training completed; vendors or online services utilized for training; soft skill training; encouraging employees who do not want to develop; on-the-job development plans; successfully planning and allocating time for professional development; and Knowledge Skill Tree or Knowledge Map for application development or system infrastructure teams. 18 Pages (NV2461)

DATA GOVERNANCE TRANSCRIPT NOREX Members discussed how data governance is defined and does it include data quality and master data; the scope of data governance (creation to deletion); who drives data governance; critical departments included in data governance; best practices and framework to launch data governance; balancing data governance with self-service reporting; tips to get the business to see the value in data governance; tactics to push business units to take ownership of data; tools used in tracking and starting a data governance committee; handling compliance and security questionnaires asking assets to be classified with a data label; social media apps on corporate cell phones; stakeholders for data-only Change Advisory Board; and integrating disparate software solutions / single product that delivers 80% for governance. 14 Pages (NV2459)

IT GOVERNANCE TRANSCRIPT NOREX Members discussed defining and initiating IT Governance; lessons learned; data governance; pain points when starting IT governance; ensuring effective governance; where IT governance sits in the organization; authority to accept or reject proposed governance policies; promoting governance as a value-add; producing policies and guidelines; governing "citizen development"; governance tools; and securing vulnerable legacy systems. 18 Pages (NV2457)

DATA ANALYTICS / BUSINESS INTELLIGENCE TRANSCRIPT NOREX Members discussed challenges with Data Analytics and Business Intelligence; dedicated teams to manage DA / BI; tooling in use; Azure Analysis and Synapse analytics; third-party connectors; Cloud vs on-prem vs hybrid environments; leveraging Cloud computing resources to improve data modeling and processing times; implementing a Master Data Management solution; Machine Learning deployments; enabling self-service capabilities; data quality; and measuring the effectiveness of DA / BI systems. 20 Pages (NV2456)

BACKUP / RECOVERY TRANSCRIPT NOREX Members discussed tools used for backup / recovery; issues getting Veeam backups on tape; backing up to the Cloud; cost savings backing up to the Cloud; backup strategies; software / hardware for Linux Ubuntu servers; securing backups from ransomware attacks; testing recovery environments after daily backup; people responsible for overseeing backup / recovery; use of an MSP to perform backups; Recovery Point Objective (RPO) and Recovery Time Objective (RTO); cyber recovery / vault to protect against ransomware; and exercising / updating the cyberattack incident playbook. 17 Pages (NV2453)

AGILE / DEVOPS TRANSCRIPT NOREX Members discussed a framework to advance the transition from a Waterfall to Agile mentality; strategies to grow Agile maturity within an organization; moving support and product management to a Agile / Scrum-based model; best practices for managing Agile projects that impact multiple applications; rolling out a DevOps initiative; and migrating from Azure DevOps on-prem to Azure DevOps in the Cloud. 12 Pages (NV2452)

PROJECT MANAGEMENT TRANSCRIPT NOREX Members discussed leadership buy-in to form an infrastructure PM team; applications in use to track project deliverables and progress; tools utilized for project management; scheduling time for projects daily and across a calendar year; pros and cons of using Microsoft Project Online; combining traditional project management methods (Waterfall) with the Agile methodology (Scrum); working with Agile Development Teams when the business is Waterfall process; platform to work with multiple IT stakeholders who use Jira and ServiceNow; and allocating time for the unexpected work driven by business needs. 18 Pages (NV2451)

ENTERPRISE ARCHITECTURE TRANSCRIPT NOREX Members discussed Enterprise Architecture maturity; where the Enterprise Architecture team exists in the organization; governance roles and processes EA owns; executive sponsorship of the EA team; introducing EA with a slow approach; an agile approach to defining and

implementing an EA; how smaller groups should handle EA; tools and software recommendations for Enterprise Architecture Management; and developing an MDM solution to incorporate in an existing EA design. 15 Pages (NV2450)

HEALTHCARE INDUSTRY IT SECURITY TRANSCRIPT NOREX Members discussed when risk outweighs an operational mandate; managing comprehensive security; successful tool and processes for centralized or almost-centralized security management; state of cybersecurity infrastructure; routine tests to measure cybersecurity readiness; managing outside access requests such as VPN connections, vendor contract workers, etc.; Cloud-hosted EMRs; responding to natural disasters or other emergencies; and best practices for recruiting and retaining talent. 14 Pages (NV2447)

RISK MANAGEMENT TRANSCRIPT NOREX Members discussed conducting a formal risk / vulnerability assessment either in-house or by a third party; prioritizing what aspects of risk / vulnerability management are managed in-house vs outsourced; risk management programs for small businesses; different levels of risk maintained within enterprise-risk registrars; KPIs around vulnerability management; frameworks used to ensure benchmarks to measure against; balancing risk against value delivery in an Agile Minimal Viable Product (MVP); reporting for executives, application owners, and auditors; and policy to patch zero-day, critical, high, medium, or low vulnerabilities. 16 Pages (NV2446)

PATCH MANAGEMENT TRANSCRIPT NOREX Members discussed the best tools other than WSUS for patching servers and the time to report after the patch is installed; the level of automation when patching servers; automation tools for patching 3rd-party software besides SCCM; process for manually patching servers / software; enforcing or forcing workstation reboots to ensure updates and patches are applied; efficient patching and vulnerability scan frequency; VDI patching; Linux patching; Ivanti with Intune; and updating hardware drivers. 13 Pages (NV2444)

LICENSING / CONTRACT NEGOTIATIONS TRANSCRIPT NOREX Members discussed IT Contract Management vs IT License Management and who should manage each; negotiating renewals and strategies to keep price increases at a minimum; questions to ask a vendor to determine a good deal; 3rd-party services to support negotiations; handling Managed Service Contracts; Service Level Agreements; tools for License and Contract Management; and Non-Disclosure Agreements. 21 Pages (NV2441)

CHANGE MANAGEMENT TRANSCRIPT NOREX Members discussed frequency to allow changes; strategy used to define change windows; intake and prioritization of change requests; Change Advisory Board (CAB); change management toolsets; integrating automated configuration change technologies to catch unauthorized changes; tracking changes in SaaS, IaaS, or PaaS configurations; security review of changes; IT Change Management integration with overall company change management process; maturing Change Management / change enablement process; and change Management in DevOps, CI / CD, and Infrastructure as Code. 20 Pages (NV2439)

CONSTRUCTION INDUSTRY IT ISSUES TRANSCRIPT NOREX Members discussed percentage of annual revenue spent on IT; percentage of budget allocated to IT and cybersecurity; staffing ratios; pros / cons with outsourcing support to a third party; dealing with consistent communication for “undesked” workers; internet access solutions for jobsites and remote locations; paperless onboarding with users not wanting an email address; fleet management software / services in use; Oculus VR headset and local administrator rights; asset label printers for barcodes / QR codes; structure and function of a Project Management Office for IT; and iPad programs. 19 Pages (NV2436)

SERVICENOW TRANSCRIPT NOREX Members discussed the reasons to select ServiceNow and moving from other toolsets; pros / cons with implementing ServiceNow; utilizing customizations within ServiceNow and experiences with customizations during system upgrades; time to implement ServiceNow; staffing model for management; end user experience via mobile usage; Configuration Management Database; Teams integration and deploying the catalog / portal to the Teams client; Employee Center; integrating ServiceNow with work-tracking systems like Azure DevOps; Software Asset Management module; ServiceNow Discovery tools; metrics to measure customer experience; and Project Management module. 28 Pages (NV2429)

HEALTHCARE INDUSTRY IT ISSUES TRANSCRIPT NOREX Members discussed driving system utilization to

improve operational efficiencies, effect of technology deployment on staff and workflows, leveraging Cloud technology, Cloud-hosted for EMRs, separate EMRs for hospitals and clinics, single-patient portals for health information in one app, leveraging APIs, recommended healthcare apps, PMO / SDLC strategies, dedicated project managers, data analytics programs, and managing comprehensive security. 24 Pages (NV2415)

RUSSIA-UKRAINE IMPACT ON CYBERSECURITY TRANSCRIPT NOREX Members discussed trusting the resiliency of government and infrastructure security, increase in security metrics due to the war, measuring the risk impact of this event, determining dependencies and risks with overseas vendors, important steps of system hardening, email security vendors, utilizing threat intelligence effectively, preparing executives for worst-case scenarios, Honeypot as a security measure, supply chain attacks, securing Operational Technology environments, and the evaluation and address of risks from ransomware. 22 Pages (NV2410)

CONSTRUCTION INDUSTRY IT ISSUES TRANSCRIPT NOREX Members discussed PMO for IT, challenges with finding and retaining IT talent, internal vs outsourced onsite technical support, 5G connectivity, equipment used besides individual phones / tablets, WebDAV, WordPress for intranet, utilizing interactive, large-format displays such as the Dell 55" on jobsites, and security cameras used onsite. 21 Pages (NV2408)

IAM: MANAGING IDENTITIES & PROVISIONING TRANSCRIPT NOREX Members discussed lessons learned from implementing an IAM solution, the source of truth for employee information and identity, tools used on MFA privileged accounts, tools for account provisioning for Active Directory / Hybrid 365, IAM tools in use to manage user accounts, staff resources devoted to IAM, and Access Reviews / Certifications. 16 Pages (NV2405)

TRANSPORTATION INDUSTRY IT ISSUES TRANSCRIPT NOREX Members discussed the shortage of drivers, issues with finding and retaining IT workers, addressing cybersecurity risk, types of digital investments being made, managing the 3G February / March sunset dates and asset tracking, implementing Snowflake for a data warehouse solution using Azure Data Factory for ELT / ETL, solutions for source control, data dictionary, glossary of terms while following DevOps best practices, and increased infrastructure and maintenance costs. 16 Pages (NV2403)

HOSTED ERP SOLUTIONS TRANSCRIPT NOREX Members discussed whether shifting to the Cloud is the right move when an organization is primarily on-prem, integrating Cloud applications with an ERP, utilizing Boomi as an integration Platform as a Service (iPaaS), value-add with an external PM to help push ERP implementation, security concerns with sensitive data on someone else's Cloud, using Microsoft Dynamics Business Central, Oracle R12.2.5 on-prem and moving to Oracle Cloud, and utilizing a Cloud-based ERP for operations in China / South Korea. 17 Pages (NV2398)

HEALTHCARE INDUSTRY IT ISSUES TRANSCRIPT NOREX Members discussed selling IT as business value, techniques to assure IT is part of Clinical Operations future planning, IT as the unofficial project management department, IT salary comparisons, leveraging Cures Act Interoperability and planning for the Transparency and No Surprises Act, cybersecurity metrics for board presentation, HIPPA compliance, and data retention policies. 17 Pages (NV2395)

PROJECT MANAGEMENT / PMO TRANSCRIPT NOREX Members discussed the value a PMO returns to the business, the value of a PMO in a functional environment, introducing a PMO to an organization that is historically managed in silos, measuring success of a PMO for Agile Projects, the pros and cons of Waterfall vs. Agile, assigning projects, work intake process for smaller projects, tools to keep track of the lifecycle, documentation requirements for SDLC, the number of teams for Scrum Masters, and practicing Kanban. 23 Pages (NV2391)

RPA / AI / ML TRANSCRIPT NOREX Members discussed RPA / AI / ML and value realized, best use cases, machine learning, training, citizen developers, using AI to boost business, RPA vendors, tools, and programming and locking down bots. 21 Pages (NV2382)

CONSTRUCTION INDUSTRY: IT PROJECT MANAGEMENT TRANSCRIPT NOREX Members discussed how best to elevate the presence of IT project management in the Construction Industry, community of practice standardization, master service integrators, Construction Management software, credential harvesting, and

security. 14 Pages (NV2375)

SECURITY FRAMEWORKS TRANSCRIPT NOREX Members discussed the hierarchy of security frameworks; most commonly used frameworks; categorization of control, platform, and risk frameworks; and active threat hunting. 14 Pages (NV2374)

GLOBAL IT ISSUES TRANSCRIPT NOREX Members discussed the biggest issues they and their organizations are facing with a global footprint in today's business climate. The expectations with employees able to return to the office, IT talent recruiting and hiring internationally, standardization of processes, cybersecurity, procuring equipment globally, keyboard sourcing, and in-country IT support were challenges shared by all Member participants. 17 Pages (NV2371)

MICROSOFT TEAMS BEST PRACTICES TRANSCRIPT NOREX Members discussed the implementation of Microsoft Teams within an organization, Teams' members as part of the infrastructure or collaboration teams, the use of the exploratory license program, promoting adoption and usage of the platform, and VoIP integrations. 49 Pages (NV2369)

IT CHANGE MANAGEMENT TRANSCRIPT NOREX members discuss IT Change Management processes including recommended tools, governance approaches and communication protocols during this April 2021 session. 25 Pages (NV2363)

RISK MANAGEMENT TRANSCRIPT NOREX members share strategies for identifying, managing and reporting risks during this February 2021 session. 21 Pages (NV2358)

SECURITY INITIATIVES FOR 2021 TRANSCRIPT NOREX members share 2021 IT security plans including budgets, initiatives and tools during this January 2021 session. 34 Pages (NV2354)

PLANNING FOR 2021 TRANSCRIPT NOREX members share their expectations for IT budgets, staffing levels, security initiatives, user support trends and other 2021 issues during this December 2020 session. 19 Pages (NV2351)

AGILE / SCRUM / DEVOPS TRANSCRIPT Members discuss experiences and transitions moving to Agile, Scrum, DevOps environment during this November 2020 session. 21 Pages (NV2346)

BACKUP / RECOVERY TRANSCRIPT Assuring that lost data can be accessed is a key factor to assuring businesses run smoothly. This discussion on this important task includes strong conversations around Veeam as a tool and its role in backing up Exchange. 10 Pages (NV2344)

PROJECT MANAGEMENT / PMO TRANSCRIPT From getting started with a PMO to key metrics, tools used, project management governance, Waterfall vs. Agile, and more. Over 50 members participate in this September 2020 discussion. Several polls are included. 21 Pages (NV2342)

MANAGING AND MONITORING REMOTE TEAMS TRANSCRIPT NOREX Members share policies, procedures and tools for managing and monitoring remote workers during this August 2020 session. 20 Pages (NV2339)

BI / DATA ANALYTICS TRANSCRIPT NOREX Members discuss Business Intelligence and Analytics processes and tools during this August 2020 session. 19 Pages (NV2337)

ASSET MANAGEMENT / PROCUREMENT FOLLOWING COVID-19 TRANSCRIPT NOREX Members discuss ITAM strategies and tools in light of the COVID-19 Pandemic during this May 2020 session. 20 Pages (NV2323)

CHANGE MANAGEMENT TRANSCRIPT NOREX hosted this Change Management discussion in March, 2020 with 60+ Members discussing new change management practices and trends as many embrace agile, lean, digital adoption and more. 17 Pages (NV2311)

DATA WAREHOUSE FOR BI TRANSCRIPT What are the benefits of a data warehouse implemented into a BI framework? Members share the benefits they have achieved, solutions used, and best practices when engaging the business units during this December 2019 discussion. 15 Pages (NV2302)

WINDOWS 7 TO 10 UPGRADE TRANSCRIPT NOREX Members discuss experiences and recommendations for the move from Windows 7 to Windows 10 during this November 2019 Session. 14 Pages (NV2300)

PROJECT MANAGEMENT / PMO TRANSCRIPT NOREX Members share their project management / PMO experiences and solutions during this November 2019 Session. 17 Pages (NV2295)

VULNERABILITY MANAGEMENT TRANSCRIPT NOREX members share recommendations on processes and tools to manage IT vulnerabilities and risks during this September 2019 Session. 20 Pages (NV2288)

IT BUDGET PLANNING / BEST PRACTICES TRANSCRIPT NOREX members discuss budget planning processes, best practices, categories and helpful tools during this July 2019 session. 14 Pages (NV2280)

DEMAND MANAGEMENT TRANSCRIPT NOREX members discuss Demand Management best practices, tools and solutions during this July 2019 session. 10 Pages (NV2277)

O365 NEW FEATURES / INITIATIVES TRANSCRIPT Members share experiences with the implementation of various Microsoft Office 365 services and features including Power BI, SharePoint, Skype for Business and Teams during this June 2019 Session. 32 Pages (NV2275)

EMPLOYEE ONBOARD / OFFBOARD IT ISSUES TRANSCRIPT Members discuss IT issues related to Onboarding and Offboarding Employees during this May 2019 session. 26 Pages (NV2273)

PROJECT MANAGEMENT / PMO TRANSCRIPT Members discuss IT Project Management methodologies and tools during this April 2019 Session. 17 Pages (NV2269)

AGILE / SCRUM / DEVOPS TRANSCRIPT NOREX members share strategies, tools used and experiences with working in an Agile/Scrum/DevOps environment during a February 2019 Session. 21 Pages (NV2259)

IT GOVERNANCE TRANSCRIPT NOREX members share recommendations for the establishment and management of an effective IT Governance practice during this January 2019 session. 11 Pages (NV2256)

SELECT: ESTABLISHING A PMO TRANSCRIPT NOREX Select Members from Fortune / Forbes 1000 organizations discussed implementing a PMO with little project management experience; enhancing project manager skills; selling the idea of a PMO; driving buy-in for an IT PMO; developing PM competency vs managing the portfolio; and using AI for automation and follow-up. 14 Pages (NS260)

SELECT: AGILE / DEVOPS TRANSCRIPT NOREX Select Members from Fortune / Forbes 1000 organizations discussed driving change for an Agile / DevOps culture; DevOps teams and responsibilities; tools for Agile Project Management; Jenkins and other tools; code reviews; and metrics to measure team performance. 13 Pages (NS257)

SELECT: PROJECT MANAGEMENT TRANSCRIPT NOREX Select Members from Fortune / Forbes 1000 organizations discussed methodologies in use; adopting Agile Project Management principles; tracking the stages of work; IT resource capacity management; team project management with M365; resource utilization planning tools; Jira advanced roadmaps; and Planview portfolios. 13 Pages (NS249)

SELECT: RESOURCE MANAGEMENT & CAPACITY PLANNING TRANSCRIPT NOREX Select Members from Fortune / Forbes 1000 organizations discussed dedicated resource management teams; who makes project management assignments; leadership training for resource allocation; best practices for defining and estimating demands; final authority and actual vs estimate; tools; and emergent work. 13 Pages (NS246)

SELECT: MANAGING TECHNICAL DEBT TRANSCRIPT NOREX Select Members from Fortune / Forbes 1000

organizations discussed the definition, management, and communication of technical debt; how to identify, surface, and prioritize TD; risk as an assessment; using employee retention as leverage; management in the Cloud vs on-prem; IT in the enterprise hierarchy; and balancing TD and product development. 15 Pages (NS247)

SELECT: APPLICATION MANAGEMENT TRANSCRIPT NOREX Select Members from Fortune / Forbes 1000 organizations discussed developing a business application catalog: the use of ServiceNow; application tracking and data synchronization; automating processes; user education on the latest apps, tools, and features available for use; identifying a source of truth; asset management; and outsourcing asset management. 11 Pages (NS242)

SELECT: BUSINESS RESILIENCY TRANSCRIPT NOREX Select Members from Fortune / Forbes 1000 organizations discussed business continuity vs business resiliency; business resiliency framework; escalating incident response to crisis management; value of business continuity to organization in post-COVID world; guiding principles regarding manufacturing autonomy and resiliency; hybrid / remote work affecting alternate site strategy; and storing DR documented processes / runbooks so they are easily accessed during an event. 15 Pages (NS240)

SELECT: CHANGE MANAGEMENT TRANSCRIPT NOREX Select Members from Fortune / Forbes 1000 organizations discussed Change Management best practices and initiatives; who in IT can submit standard changes; implementing a continuous-release or release-on-demand process; documenting UAT and PIT test completion with evidence using ServiceNow; incorporating Cloud into Change Management policies and procedures; system-based approvals; Change Manager or coordinator closing change requests; risk calculation scoring; combining infrastructure and application teams; and security review of changes. 19 Pages (NS239)

SELECT: IT GOVERNANCE TRANSCRIPT NOREX Select Members from Fortune / Forbes 1000 organizations discussed initiating a governance process; the scope of IT Governance; defining IT Governance; decision makers and how decisions are made; establishing governance standards; IT Governance tools; Change Management considerations; maintaining process; and dealing with a less-rigid planning cycle. 13 Pages (NS238)

SELECT: ENTERPRISE ARCHITECTURE TRANSCRIPT NOREX Select Members from Fortune / Forbes 1000 organizations discussed top priorities for your Enterprise Architecture team in 2023; recommendations on maturing a “new” EA team; EA team as centralized, decentralized or a hybrid of both; EA groups providing value to Agile development groups; effective training methods for a new EA team; techniques to assess cybersecurity for an architecture; evolution of Zero Trust concepts and data governance; and value from an investment in an EA tool. 18 Pages (NS237)

SELECT: AGILE / DEVOPS TRANSCRIPT NOREX Select Members from Fortune / Forbes 1000 organizations discussed future organizational growth of Agile / DevOps; organizational changes necessary to ensure DevOps success; DevOps success with development lifecycle outside of SDLC and projects with a hybrid approach; implementation of DevOps in organizational silos; setting up DevOps teams and assigning responsibilities; security requirements in the DevOps process – integrated or considered +1; economies of scale; lessons learned adopting a DevOps culture; and transitioning from Waterfall projects to Agile. 14 Pages (NS236)

SELECT: VENDOR RISK MANAGEMENT TRANSCRIPT NOREX Select Members from Fortune / Forbes 1000 organizations discussed driving security improvements and measuring results among vendors and suppliers; how Vendor Risk Assessment activities are performed and what results from that activity; what portions of the vendor survey add the most value; what departments in an organization should be included to assess the Vendor Risk Assessment; the process for creating on-site or remote assessment in addition to vendor assessment; proper responses to poor performance, vendor-caused incidents, business disruptions, and negative financial impact; third-party training before onboarding; fourth-party compliance; process for vendor to submit notification of system maintenance or changes; and management of lifecycle from initiation to off-boarding vendors. 19 Pages (NS232)

SELECT: IT CHANGE MANAGEMENT TRANSCRIPT NOREX Select Members from Fortune / Forbes 1000 organizations discussed new trends in Change Management, system-based approvals, days required before a CAB meeting to submit a change, Change Manager / Coordinator to close change requests, combining

Infrastructure and Application teams, security review of changes / criteria to add a security approval or task, identifiers used for automated risk analysis, tracking changes in SaaS, IaaS, or PaaS configurations, recommendations for reconciling DevOps continuous delivery and Change Management, transitioning to a Digital Dexterity Culture, communicating IT changes to the business / user community, handling emergency / retroactive changes, and unauthorized change best practices and tools. 28 Pages (NS224)

SELECT: SERVICENOW TRANSCRIPT NOREX Select Members from Fortune / Forbes 1000 organizations discussed achieving primary value drivers for a ServiceNow implementation, organization structure, implementation timelines, SAM Pro module, managing services in SNOW, ServiceNow enabling other IT capabilities and systems such as CMDB, and CAB workbench to run a CAB meeting. 18 Pages (NS213)

SELECT: PROJECT MANAGEMENT TRANSCRIPT NOREX *Select* members discuss Project Management methodologies, governance and tools during this January 2021 session. 13 Pages (NS205)

QUICK POLL RESULTS: SOFTWARE TOOLS In January 2025, 85 NOREX Member organizations responded to a poll regarding software tools. The categories included Artificial Intelligence, Disaster Recovery / Business Continuity, Document Management, Enterprise Data Storage, IT Service Management, Network Management, Security, and VDI. 6 Pages (NP2557)

QUICK POLL RESULTS: IT STAFFING & BUDGETING 2024 In October 2024, 112 NOREX Member organizations responded to a poll regarding IT staffing & budgeting. Questions included organization's total revenue, IT staff size, IT staff dedicated to cybersecurity, employee and customer end-users supported, 2025 IT staff size, salaries and budget compared to 2024, IT staff size as a percentage of the organization's overall staff size, and 2025 IT budget as a percentage of the organization's overall budget. 7 Pages (NP2537)

QUICK POLL RESULTS: CYBERSECURITY In June 2024, 107 NOREX Member organizations responded to a Cybersecurity poll. Questions included where cybersecurity resides, framework, anticipated IT security budget for 2025, percent of revenue your IT security budget represents, IT staff dedicated to cybersecurity, vendors used for security assessments, MFA / Two-factor authentication requirements, MFA solutions used, status of cybersecurity insurance, phishing test frequency, and security awareness or phishing training modules used. 7 Pages (NP2524)

THE VALUE OF AN INCIDENT RESPONSE PLAN This Member Presentation was given by an IT Project Manager with over 39 years of experience in IT positions, including Developer, Applications Manager, Project Manager, Consultant, and IT Director. He discusses lessons learned as his org recovers from a RansomHub threat actor attack. 23 Pages (MP002)

CYBERSECURITY FRAMEWORKS This Member Presentation describes a cybersecurity framework as an essential tool that helps organizations to better manage, improve, and maintain their cybersecurity systems. 19 Pages (MP001)

GOVERNMENT: PROJECT MANAGEMENT TRANSCRIPT Government Members discuss IT Project Management methodologies and tools during this January 2019 Session. 17 Pages (GSP098)

IT TRENDS 2024 Q4 IT Trends is a collection of the NOREX Member input captured in the fourth quarter of 2024 from NOREX event polls. The IT professionals who make up NOREX realize the benefits of no-vendor bias when analyzing IT polls and trends. 37 Pages (DT2024-4)

IT TRENDS 2024 Q3 IT Trends is a collection of the NOREX Member input captured in the third quarter of 2024 from NOREX event polls. The IT professionals who make up NOREX realize the benefits of no-vendor bias when analyzing IT polls and trends. 24 Pages (DT2024-3)

IT TRENDS 2024 Q2 IT Trends is a collection of the NOREX Member input captured in the second quarter of 2024 from NOREX event polls. The IT professionals who make up NOREX realize the benefits of no-vendor bias when analyzing IT polls and trends. 28 Pages (DT2024-2)

IT TRENDS 2024 Q1 IT Trends is a collection of the NOREX Member input captured in the first quarter of 2024 from NOREX event polls. The IT professionals who make up NOREX realize the benefits of no-vendor bias when analyzing IT polls and trends. 32 Pages (DT2024-1)

IT TRENDS 2023 Q4 IT Trends is a collection of the NOREX Member input captured in the fourth quarter of 2023 from NOREX event polls. The IT professionals who make up NOREX realize the benefits of no-vendor bias when analyzing IT polls and trends. 25 Pages (DT2023-4)

IT TRENDS 2023 Q3 IT Trends is a collection of the NOREX Member input captured in the third quarter of 2023 from NOREX event polls. The IT professionals who make up NOREX realize the benefits of no-vendor bias when analyzing IT polls and trends. 22 Pages (DT2023-3)

IT TRENDS 2023 Q2 IT Trends is a collection of the NOREX Member input captured in the second quarter of 2023 from NOREX event polls. The IT professionals who make up NOREX realize the benefits of no-vendor bias when analyzing IT polls and trends. 36 Pages (DT2023-2)

IT TRENDS 2023 Q1 IT Trends is a collection of the NOREX Member input captured in the first quarter of 2023 from NOREX event polls. The IT professionals who make up NOREX realize the benefits of no-vendor bias when analyzing IT polls and trends. 45 Pages (DT2023-1)

IT TRENDS 2022 Q4 IT Trends is a collection of the NOREX Member input captured in the fourth quarter of 2022 from NOREX event polls. The IT professionals who make up NOREX realize the benefits of no-vendor bias when analyzing IT polls and trends. 37 Pages (DT2022-4)

IT TRENDS 2022 Q3 IT Trends is a collection of the NOREX Member input captured in the third quarter of 2022 from NOREX event polls. The IT professionals who make up NOREX realize the benefits of no-vendor bias when analyzing IT polls and trends. 44 Pages (DT2022-3)

IT TRENDS 2022 Q2 IT Trends is a collection of the NOREX Member input captured in the second quarter of 2022 from NOREX event polls. The IT professionals who make up NOREX realize the benefits of no-vendor bias when analyzing IT polls and trends. 43 Pages (DT2022-2)

IT TRENDS: 2022 Q1 IT Trends is a collection of the NOREX Member input captured in the first quarter of 2022 from NOREX event polls. The IT professionals who make up NOREX realize the benefits of no-vendor bias when analyzing IT polls and trends. 57 Pages (DT2022-1)

CIO: AI & PREDICTIVE ANALYTICS TRANSCRIPT NOREX Members discussed achieving quick wins; educating the workforce for usage; using AI for planning and IT roadmaps; utilizing AI for predictive analytics for the enterprise; data strategies for usage on smaller IT teams; and bias in modeling. 13 Pages (CV088)

CIO: ALIGNING BUSINESS & TECHNOLOGY PLANNING TRANSCRIPT NOREX Members discussed stakeholder involvement in planning; usage of a steering committee; technology roadmap tools; capability mapping; consultant involvement; organizational considerations; business-led ERP implementation; steps to achieve IT objectives; digital transformation and ChatGPT usage; cyber training for leadership; retaining staff; and transferring IT leadership. 17 Pages (CV083)

CIO: IT DEPARTMENT KPIs TRANSCRIPT NOREX Members discussed metrics shared with Executive Leadership to show IT department's value, common KPIs tracked, performance-level KPIs tracked other than MTTA and MTTR, creating a balanced scorecard for infrastructure, help desk and application development, total tickets vs open tickets, measuring customer satisfaction rates, KPIs and data interpretations of security-related issues, key performance indicators to monitor with Managed Security Service Providers, monitoring the effectiveness of patching program, IT ROI, IT expenses, and identifying your cost breakdown. 26 Pages (CV080)

CIO: IT BUDGETING & PLANNING FOR 2022 TRANSCRIPT NOREX Members discussed projecting vendor price increases, cybersecurity goals aligning with legal and cyber insurance needs, percentage of IT budget to overall budget, success stories to acquire more funding and staff, the cost to move to the Cloud, software, infrastructure, and platforms when moving to the Cloud, leveraging ARPA funding in 2022, mid-year reviews to

analyze spending, determining the optimal size for an IT organization, critical-success criteria, and measuring productivity of software developers in an Agile Scrum environment. 24 Pages (CV078)

CIO: ROLE / JOB DESCRIPTION OF THE CIO TRANSCRIPT Senior IT leaders discuss the evolution of the Chief Information Officer role during this October 2020 session. 17 Pages (CV076)

CIO: IT'S ROLE IN BUSINESS SUCCESS TRANSCRIPT Senior IT leaders share strategies for aligning IT with business objectives during this July 2020 Session. Topics include cloud computing, staffing, project prioritization and Business Intelligence tool recommendations. 20 Pages (CV075)

CIO: IT TRANSFORMATION TRANSCRIPT This March 2019 session featured strategic-level discussion on starting the transformation process, gaining executive support, involving business units and developing roadmaps for cloud usage and mobile device management. 19 Pages (CV071)